

10 December 1973

MEMORANDUM FOR:

SUBJECT : Planning Notes

1. This is the first in a series of Planning Notes which I plan to send out to DDI components in order to share information with you on planning, management, records, word-processing, copying machine questions, and budget and financial matters. These notes will be issued as the need arises or information of possible interest to you becomes available. Any suggestions you might have for making this vehicle more useful will be appreciated.

2. MBO Progress. A "Reference Aid for Management Planning in the Intelligence Directorate" has just been completed and sent out to the offices to assist you in implementing MBO. You should also know that we are presently working with the Office of the Comptroller along with others to develop revised DCI Objectives for FY 1975-76 for the Agency as a whole. Your comments and suggestions on prospective DCI Objectives will be solicited shortly.

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3. MBO Module. [REDACTED] a management consultant from [REDACTED] has been helping OTR develop MBO training techniques. Currently he is working with CRS and OWI to develop a module for implementing MBO at the branch level, linking branch objectives with office and directorate objectives.

4. Budget Reminder. Your five-month review of obligations as of 30 November is due by 21 December. (Our Seasons Greetings to all those who are under the gun on this one.)

5. Trend Reports Distribution. Have you responded to the memo from OJCS/MAP on accuracy of the distribution of obligations trend reports? You should know for future use as well as for the current general survey that preparation of distribution lists is completed early in the month preceding the month of issue. January's lists on reports covering December data are now closed. If you have not responded to the OJCS/MAP

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memo yet, getting into the system and arranging for regular direct receipt of your reports requires you to contact OJCS/MAP as instructed in their memo by 8 January 1974. From then on you will be required to contact them only to change the distribution.

6. Admin/Support Study. The study made of administrative and support staffs in the Directorate in recent months is currently being reviewed by the DDI. Decisions on the findings and recommendations will be passed on to you in due course.

  
DD/I Planning Officer

STATINTL

DISTRIBUTION:  
(See attached list)

GRK:mak  
File ✓  
Chrono

Suggested

Distribution for Planning Notes

1 - ADDI  
1 - Chief, DDI Admin - Attn: [REDACTED] STATINTL  
1 - Dir, CRS STATINTL  
1 - Dir, IAS  
STATSPEC 2 - Dir, OBGi - Attn: [REDACTED]  
1 - Dir, OBGi - Attn: [REDACTED]  
1 - [REDACTED] - Attn: [REDACTED]  
1 - [REDACTED] - Attn: [REDACTED]  
1 - Dir, OCI - Attn: [REDACTED]  
1 - Dir, OCI - Attn: [REDACTED]  
1 - Dir, OER - Attn: [REDACTED]  
1 - Dir, OER - Attn: [REDACTED]  
1 - Dir, OPR  
1 - Dir, OSR  
1 - Dir, OSR - Attn: [REDACTED] STATINTL  
1 - Chief, IRS  
1 - Chairman, COMIREX Staff  
1 - DDI Planning Staff

3 December 1973

TO: Gene  
FROM: Joe  
SUBJECT: DDI Planning Notes

STATINTL

1. I would like to suggest that we consider borrowing a good idea from [REDACTED] and start [REDACTED] our own "DDI Planning Notes" modeled after his Administrative Notes with the same informal format.
2. Rather than establishing a monthly routine for these notes, I would see them being sent out only when we have something to say.
3. Topics could include:
  - Reminders on due dates for various calls; (they seem to need it)
  - Developments on the budget, records management, staffing complements, etc.
  - Worthwhile books and papers on MBO, budgeting, etc.
  - Changes in the Planning Schedule, etc.
4. Dissemination should be aimed at Office Managers, Planning Officers, and Budget Officers.
5. Another alternative would be to combine with Dixon in one such vehicle. But there could be a problem over desired readership.
6. If you're at all interested, I'm sure that other members of the Staff can improve upon this basic idea.



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MANAGEMENT NOTES INDEX

<u>No.</u>	<u>Subject</u>	
14	Reporting Employment & Financial Information Security	
15	TDY Foreign Travel	
16	Fitness Reports on OP Careerists	
17	Distribution of Notices and Bulletins Position Job Evaluation System Language Proficiency Cash Award	
18	Security End-of-year MBO Report	
19	Foreign Travel Projection-Reminder	
20	Applicant File Rejection	
21	Increase in Per Diem Rates for Long-Term Training	
22	QSI Recommendations	
23	Supergrade Promotion Recommendations Annual Comparative Evaluation Review	
24	Minority Employment [REDACTED] - DDI EEO Officer	STATINTL
25	Minority Employment	
26	[REDACTED]	STATINTL
27	Name & Functions of the DDI Admin and Plans & Programs Staff / Budget & Fiscal Staffs	
28	Survey by Office of Personnel Personnel Development Profiles Use of Consultants Panelists under E.O. 11905	
29	Booklet, Intelligence in the War of Independence DDI Reps Overseas Audit Staff Review	
30	[REDACTED] detail to DDI Admin Staff	STATINTL
31	Equal Employment Opportunity	
32	Passenger Transportation on Saturday	

MANAGEMENT NOTES INDEX

<u>No.</u>	<u>Subject</u>
28	Travel in Connection with Award Ceremonies DDI Attitudinal Survey Foreign Affairs Executive Seminar
29	Reporting Results of Comparative Evaluation Three-Percent Exercise
30	Identification of DDI Personnel, with their black line telephone numbers, in DDI Reports they originate
31	Notification of Three Percenters

Management Notes - 1976

1	Full-Time Academic Training -- Reminder
2	Three Percent List Transmittal of Finished Intelligence to OMB Safety Hazard -- Desk Lamp
3	Logistics Requirements Funding Limit for Renovations
4	Mgmt Advisory Group (MAG)
5	Reporting Unexpected Absences
6	DDI N 20-142 Travel Staff Studies
7	Federal Health Hazard Awareness
8	Court Proceedings for Employees Under Cover Scheduled Tours of the Domestic Communications Activity Facilities
9	Details Into or Out of CIA
10	Foreign Travel Projection Full-Time Academic Training Official Reception Expenses
11	
12	Personnel Actions--Reminder
13	Official Reception & Representation Expenses at Hqs and Domestic Facilities

STATINTL

MANAGEMENT NOTES INDEX

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<u>No.</u>	<u>Subject</u>	
14	[REDACTED]	
15	Full-time Academic Training Single versus Two-Part PHS	
16	Contract Employment Commitments to Applicants Reminders	
17	Letters of Instruction Reminder	
18	Referral of Employees to the Retirement Affairs Div PDP-- Part II -- Developmental Profiles	
19	Sole Source Procurement	
20	Change in Char Force Schedule Foreign Travel by DDI Personnel EOD Actions Reminder	
21	PMCD Component Assignments Name Listings of New Employees Review of Minority Applicant Files	
22	Supergrade Promotions	
23	Personnel Development Program Admin Personnel Changes Security Travel	
24	Agency Mgmt Advisory Group (MAG)	
25	Details to Other Agencies Details to Other Directorates Soft Files	STATINTL
26	[REDACTED] (Handbook of Required Reading) Travel Projections	STATINTL
27	Telephone Services - [REDACTED] dtd 25 Sep 75 Logistics/Telephone Work New Employee Processing	

MANAGEMENT NOTES INDEX

<u>No.</u>	<u>Subject</u>
<u>Management Notes - 1975</u>	
1	Equal Employment Opportunity Parking Program Call
2	Stenographic Requirements Monitoring Agency Employees Detailed to other Govt Agencies
3	DDI Mgmt Staff Renovation Collective Addressing of Book Cables
4	Deadline for PDP Section II - Developmental Profiles Adverse Personnel Actions AOP
5	Program Call Part-time Employees Attendance of Academic and Professional Meetings Telephone Changes
6	Excess Baggage - Extended TDYs Authorization for Priority Telephone Work
7	Fitness Report Ratings Managerial Grid Intelligence Directorate Bulletin Board Work Orders Funded by Office of Logistics
8	Administrative Contacts - DDI Mgmt Staff Gray Telephones Suggestion & Achievement Awards Program Certificate of Exceptional Service Hazardous Areas Budget & Finance Contacts--DDI Mgmt Staff
9	Travel Projections PDP Part II - Developmental Profiles Intelligence in World Affairs Course Suggestion and Achievement Awards Program
10	Request to Offices for Logistical Services Designee
11	Combined Telephone Directory
12	Preparing and Transmitting Classified Material by the New Consolidated Courier Service
13	Reporting Employment & Financial Information



MANAGEMENT NOTES INDEX

<u>No.</u>	<u>Subject</u>	
17	Supergrade Promotion Recommendations New Members on Mgmt Staff	
18	Clerical Reassignment from TAS Security (violations) Thefts Administrative Leave	STATINTL
19	[REDACTED] reduced in Personnel Moratorium on purchase of new executive furniture in FY75	
20	Environment Committees Training for FMOs Travel Projection Travel Accountings Personnel Change - Security Officer	
21	[REDACTED] Letter of Instruction Thefts	STATINTL
22	MBO Training OTR Intelligence in World Affairs Course Special Clearances Processing	
23	Estimated requirements for purchase of new computer terminals Foreign travel by DDI employees for other directorates	
24	Type of letter to be given three percenters First Class Travel	
25	Retirement Information Storage Problems Combined Federal Campaign	STATINTL
26	Moratorium - Executive Furnishings Hotel Reservatins, [REDACTED]	
27	Staffing Complements Requests for Computer Services Off-Campus Program for 1975 Spring Semester [REDACTED] Publication and Speaking Requests	STATINTL
28	Staff Studies for Travel [REDACTED] Request for Conversion from Reserve Appointment to Career Status	

MANAGEMENT NOTES INDEX

<u>No.</u>	<u>Subject</u>
9	Security (violations) Personnel Actions Special Purpose Vaults
10	Parking TDY Travel Due Date
11	Contract Employees Security (violations) Cover Safety Nominations for Senior Officer Schools
12	Special Briefing for Dept of State Retirements Spouse accompanying employee on trip at own expense Routine admin items requiring concurrence of ADDI Secretarial Guide Char Force and security Security (violations)
13	Two-sided Copying Certification of Outside Employment and Financial Information Recruitment Travel Staff Studies Distribution of Notices Publication and Speaking Requests
14	Chauffeur Services Annual Report Submission Rendezvous Room
15	Chart showing schedule for various planning and budget submissions Employee responsibilities re Foreign Gifts and Decorations Act of 1966 Security (violations) Vacancy Notices for Agency-wide distribution Centralization of Intelligence Directorate budgets
16	Office Annual Report Submissions Appointment of Information Systems Security Officer Annual Planning/Budget Cycle Conference Rooms

STATINTL

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Planning Notes - Dec 1973

First in series of Planning Notes  
MBO Progress  
MBO Module  
Budget Reminder  
Trend Reports Distribution  
Admin Support Study

Management Notes - 1974

No.

Subject

- 1 Memo from DCI on Energy Conservation  
Memo from OC on Shortage of Gray Telephone Lines  
and Instruments
- 2 Telephone Security when using black line  
Char Force  
CSB Requirements  
Memo: Clerical Testing and Restoration of Grade, Salary,  
and Title for New Clericals Who Fail to Pass Tests and  
are Downgraded  
Survey of Office Copying Equipment
- 3 Supergrade Promotions Recommendations  
Table: Major Elements of the Annual Planning/Budget Cycle
- 4 ADDI Reviewing Official on Fitness Reports for Deputy  
Office Heads and Deputy Staff Chiefs only  
Deadline for budget submission to Comptroller
- 5 Use new Fitness Reports forms  
Certification by employee that he has seen both supervisor's  
and reviewing official's comments on fitness reports  
Gray Telephone Lines - thanks from D/OC for cooperation  
Use of Rendezvous Room
- 6 Security  
Xerox Copiers  
Applicant Handling
- 7 Assignment to the Development Complement  
Retroactive Salary Payments  
Foreign Travel Staff Studies  
Due Dates  
Book for Managers
- 8 Security (form 2018a)  
Foreign Travel Staff Studies  
Auditorium Services